

**Monthly Report to the Special Trustee  
Office of Trust Records  
January 2001**

**Following are highlights of records management activities performed by the Office of Trust Records during January 2001.**

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**STAFFING**

- ❖ **Management Analyst positions** (research, develop, and implement records management policies, retention schedules; training curricula and aids, etc.)
  - One supervisory position to be classified and advertised—recruitment action on this position has been delayed as a result of the time that it has taken to make administrative changes to organizational structures in conjunction with funding structures and the current hiring freeze imposed by the new Administration
  - Received list of eligible applicants for GS-13 position (Electronic Records)
- ❖ **Records Management Specialist positions** (implement records management program, BIA disposition backlog, records cleanup, etc.)
  - Arrival date of new specialist delayed two weeks (start date is now early February)
  - One supervisory position to be classified and advertised—recruitment action on this position has been delayed as a result of the time that it has taken to make administrative changes to organizational structures in conjunction with funding structures and the current hiring freeze imposed by the new Administration
- ❖ **Archives Technicians positions** (search for refiled or interfiled records; receive, move, inventory, and shelf records)
  - Selection for one vacant position delayed by the current hiring freeze imposed by the new Administration
- ❖ **Administrative support positions** (provide clerical and administrative operations support to records staff)
  - Office automation clerk came on board January 29
- ❖ **Computer Specialist positions** (analyze, develop, and implement information technology solutions; manage projects to implement electronic records programs for BIA and OST)—these positions are now subject of the current hiring freeze
  - Selection made for GS-13 position
  - One vacant 5/7/9 position to be advertised
  - One vacant 9/11/12 position to be advertised
  - One supervisory position to be classified and advertised

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**TRAINING**

❖ **BIA:**

- Presented mid-level management records awareness briefings to employees at the following locations
  - BIA Central Office location—67 employees
  - Southern Pueblos Agency—21 employees
  - Southwest Regional Office—30 employees
- Presented basic records management training to employees at the following BIA location
  - Northern Pueblos Agency—17 employees

❖ **IARM:** Staff participated in team building and wellness training

**CONTRACTORS**

- ❖ **Iron Mountain Records Management Services** – prepared records for local storage or transfer to Federal Records Center
  - Ft. Belknap Agency— 233 boxes completed
  - Ft. Berthold Agency—190 boxes
  - IARM (Hawkins)—180 boxes
- ❖ **G&G Advertising**—IARM submitted revisions to pamphlets; revised pamphlets submitted to printer
- ❖ **Bradson Corporation**—vital records workshop scheduled for January 30 postponed until February 13
- ❖ **Native American Industrial Distributors**—on going assistance provided with project management

**OTHER WORK**

❖ **Disposition Backlog at BIA Locations**

- Worked with BIA locations to transfer records to Federal Records Centers
  - Papago Agency—127 boxes
  - San Carlos Agency—63 boxes

❖ **Analyze Records Storage Requirements**

- Visited the following BIA location to complete the assessment of current records storage requirements, inactive records disposition backlogs, and records transfer to appropriate storage facilities
  - Navajo Regional Office—report attached
  - Southwest Regional Office—to be completed Feb 2001

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- ❖ **Develop and Issue BIA/OST Records Manuals, Training Aids and Provide Technical Assistance**
  - Continued work with contractor on technical leaflets
  - Provided ongoing technical assistance to BIA regional and agency offices
- ❖ **Replace Historical Records With Working Copies**
  - No action this month
- ❖ **Complete Plan to Comply with Electronic Records Requirement**
  - Evaluated a proposal from Millican & Associates for Electronic Records Management Program Assistance
    - Millican will work with OTR to complete an Electronic Records Policy and develop a plan to implement the policy
    - OTR has initiated procurement documents based on this proposal
- ❖ **Complete Submission of Records Control Schedules to NARA**
  - IARM staff visited the following BIA locations to inventory BIA records for use in schedule development
    - Office of Economic Development (Central Office)—not completed
    - Office of Indian Gaming (Central Office)—completed
    - Office of Trust (Central Office)—completed Realty
    - Office of Tribal Services (Central Office)—completed Housing, Acknowledgment, and Enrollment
    - Southern Ute Agency (Southwest Region)—not completed
- ❖ **Conduct Cyclic Evaluations of Records Programs**
  - Completed a records program evaluation at the following BIA location
    - Navajo Regional Office
- ❖ **Establish Life Cycle Database (Inventory) for Trust Records**
  - Developed a data entry database for use by Iron Mountain in inventorying BIA records—demonstrated to Iron Mountain and IARM staff
    - Changes will be made after written comments are received
    - To be installed at Iron Mountain (Albuquerque) in February and Iron Mountain (Portland) in March
  - Design continued on the baseline MS Access Life Cycle Data base—the platform that will be used for conversion to Versatile
  - Analysis continued on various other databases and spreadsheets that contain inventory information that is to be converted to Versatile
- ❖ **Award New Contract for OST Imaging**
  - LATA obtained leased space and configured it for imaging trust records

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- Obtained staff and have been training them
  - Written programs to facilitate indexing the Daily Work Documents and are working on a script to prepare the images and indexes for the ARCIS system
  - LATA has requested an equitable adjustment because they assert that unexpected volume of indexing has increased their costs
- ❖ **Establish Pilot Project(s) for Electronic Record Keeping**
- On January 9 and 10 staff from TREEV, Inc. was in Albuquerque to discuss the design of the pilot FAX Capture project
  - Meetings were held with OTFM to refine design requirements
  - TREEV has submitted a modified proposal for this project